

Basic Dataverse Training for Astronomy

August Muench, CfA 2012

Dataverse is a collaboration of



Hands-on Tutorial: Create a Dataverse

*Follow steps in this section to create
your own Dataverse*

Dataverse URLs

- Experiment in the “demo” version of the Dataverse Network:

<http://dvn-demo.iq.harvard.edu/dvn>

- Create a real Dataverse in the “production” version of the Dataverse Network:

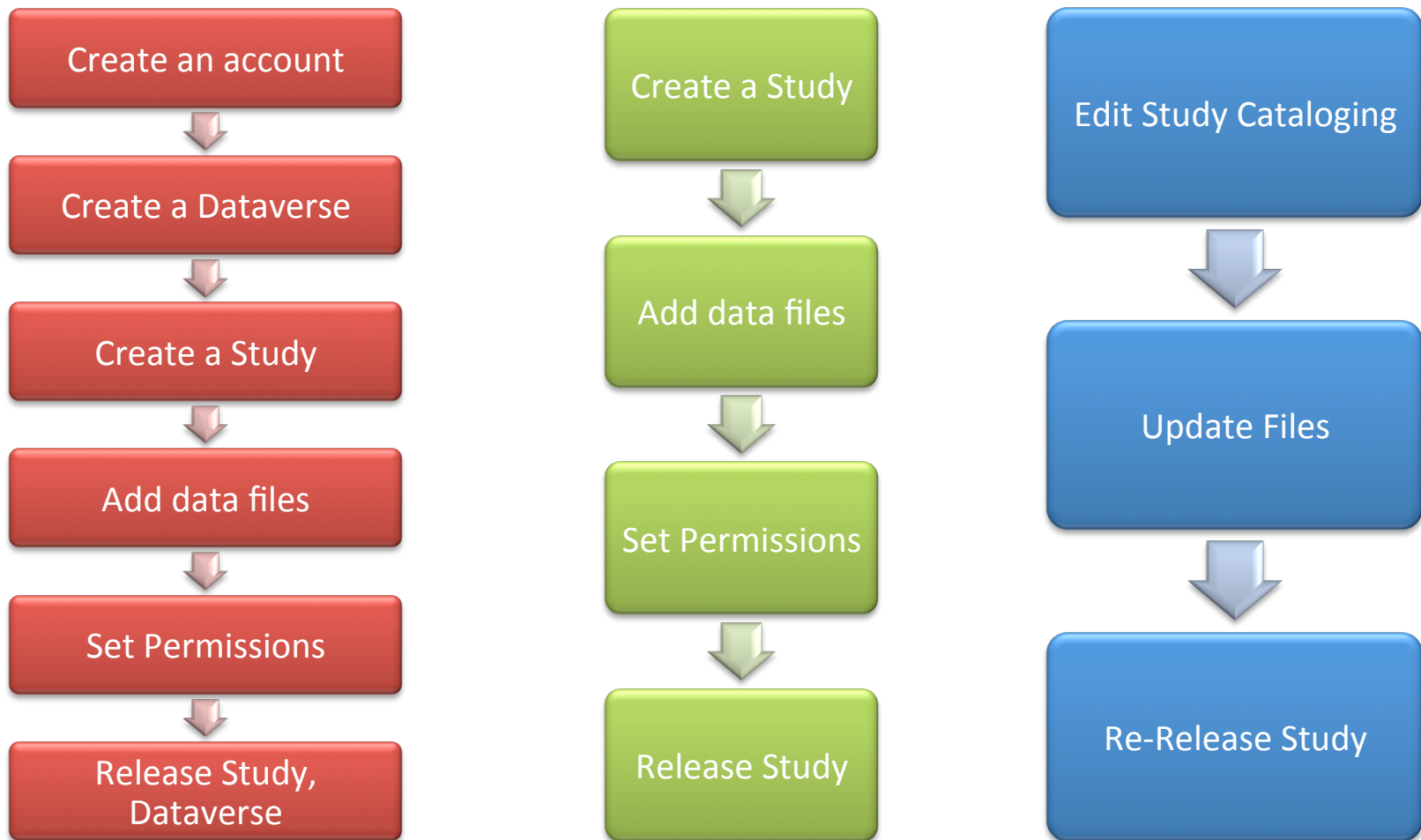
<http://dvn.iq.harvard.edu> (Social Sciences)

<http://theastrodata.org> (Astrophysics)

For More Information

- Digital Scholarship @Harvard
<http://ds.hul.harvard.edu/ds>
 - Schedule of Events
 - Handouts
 - Slides
 - Other resources
- Dataverse Support
dvn_support@help.hmdc.harvard.edu (*registration, bugs, technical help*)
theastrodata@cfa.harvard.edu (*astronomy user community list*)
 - To join email majordomo@cfa.harvard.edu with body text as “*subscribe theastrodata*”

Dataverse Workflow(s)



Create an Account

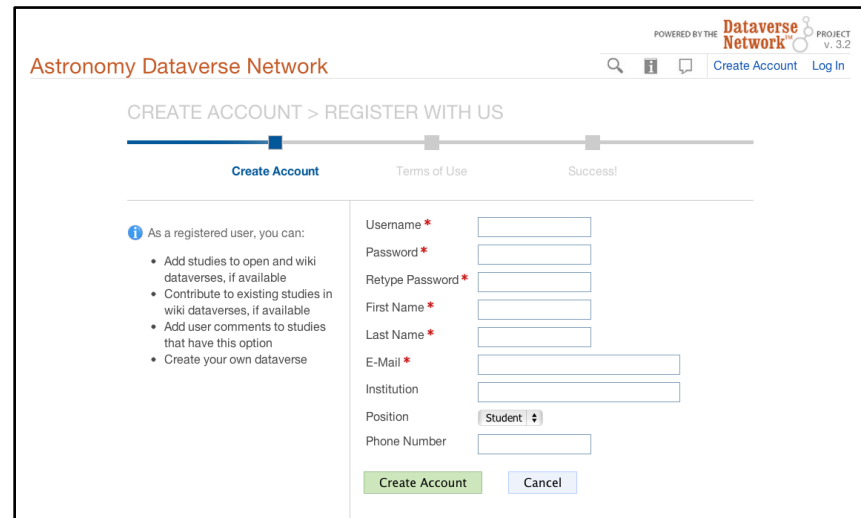
1. Go to the Dataverse Network

- Demo: <http://dvn-demo.iq.harvard.edu/dvn>
- Real: <http://theastrodata.org>

2. Select “Create Account”

3. Complete account form.

4. Log in.



The screenshot shows the 'Astronomy Dataverse Network' registration page. At the top right, it says 'POWERED BY THE Dataverse Network PROJECT v. 3.2'. The page title is 'Astronomy Dataverse Network' and there are links for 'Create Account' and 'Log In'. The main heading is 'CREATE ACCOUNT > REGISTER WITH US'. Below this is a progress bar with three steps: 'Create Account' (the current step), 'Terms of Use', and 'Success!'. The form contains the following fields: Username *, Password *, Retype Password *, First Name *, Last Name *, E-Mail *, Institution, Position (with a dropdown menu set to 'Student'), and Phone Number. At the bottom of the form are 'Create Account' and 'Cancel' buttons. On the left side of the form, there is an information icon and a list of benefits for registered users: 'As a registered user, you can: Add studies to open and wiki dataverses, if available; Contribute to existing studies in wiki dataverses, if available; Add user comments to studies that have this option; Create your own dataverse'.

Create Dataverse

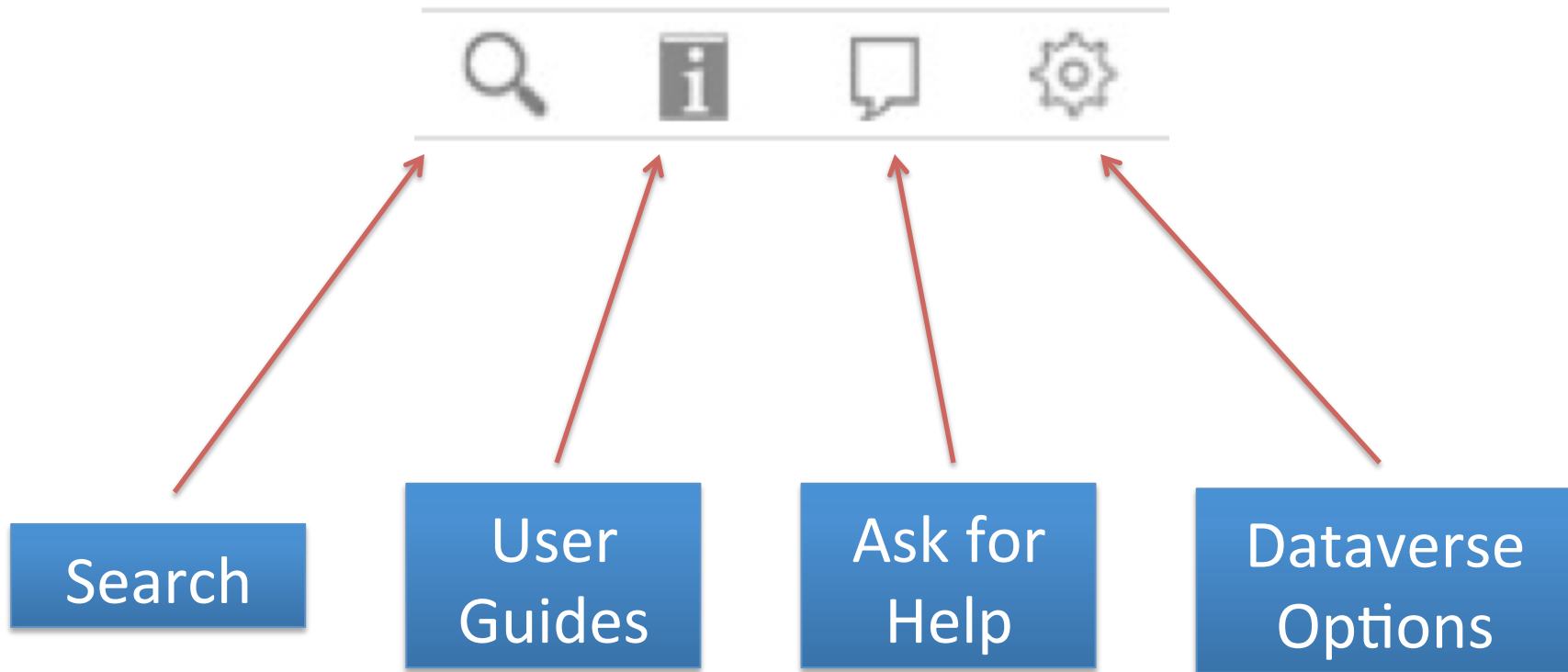
1. Go to the Dataverse Network
 - Demo: <http://dvn-demo.iq.harvard.edu/dvn>
 - Real: <http://theastrodata.org>
2. Select “**Create a Dataverse**” (*)
3. Choose Dataverse “*Type*”
 - “*scholar*” for branding as individual;
 - “*basic*” if institution or project.
4. Complete form; **Save**.
5. URL to your Dataverse is emailed to you.
 - Bookmark this URL.
It is your Dataverse homepage

CREATE A DATAVERSE
Create a Dataverse to upload your own data sets and create collections of data.

The screenshot shows the 'Astronomy Dataverse Network' interface. At the top right, it says 'POWERED BY THE Dataverse Network PROJECT v. 3.2' and includes a search icon, a user profile icon for 'Gus Muench', and a 'Log Out' link. The main heading is 'Astronomy Dataverse Network'. Below that is a blue button labeled 'CREATE A NEW DATAVERSE'. A blue information icon is followed by the text: 'Complete the fields on this page to create your dataverse. You can select more than one classification and add your dataverse to those groups.' The form fields are: 'Type of Dataverse' with two radio buttons: 'Basic -- Choose this option if you are creating a dataverse for a university, department, journal, research center, or other organizational entity.' and 'Scholar -- Choose this option if the dataverse will have your own name and contains your research project data.'; 'Affiliation' with a text input field and the label 'University, center, or research project.'; 'Dataverse Name *' with a text input field and the label 'Name used to refer to this dataverse in Dataverse Network Homepage and other pages.'; 'Dataverse Alias *' with a text input field and the label 'Short name used to build the URL for this dataverse, e.g., http://.../dv/alias'. It is case sensitive.'; 'Network Home Page Description' with a text input field and the label 'Short description to appear on the network home page with your dataverse listing.'; and 'Classification' with the label 'There are no classifications set up for this dataverse network.' At the bottom are 'Save' and 'Cancel' buttons.

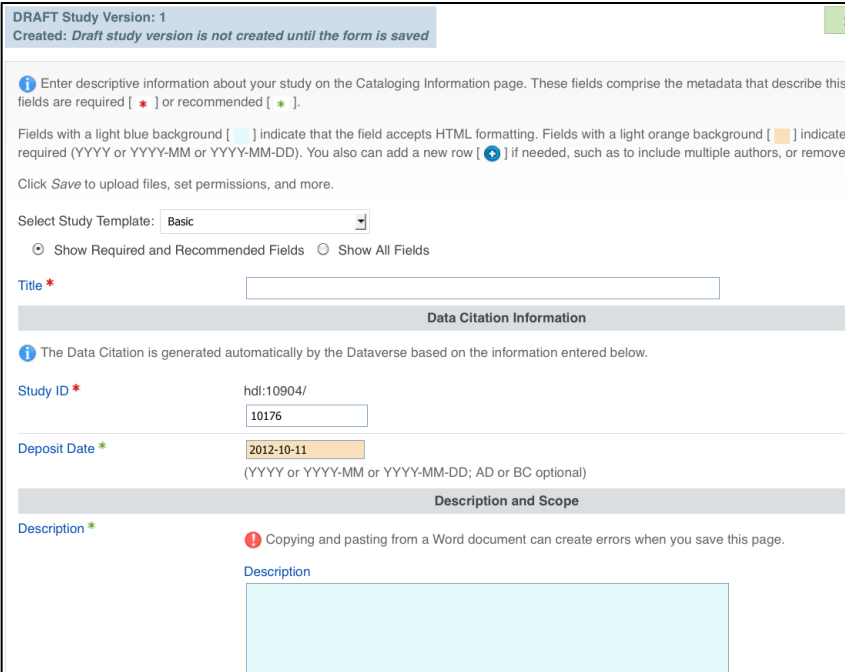
(*) If the “Create a Dataverse” button is not present then go to:
<http://theastrodata.org/dvn/faces/site/AddSitePage.xhtml>

Key to Dataverse Options Menu



Create a Study

1. Go to your Dataverse homepage and click the Dataverse **Options Icon**.
2. Click “**Create Study**”.
3. Enter a *title*.
4. A *study ID* is automatically created.
5. Click **Save**.



DRAFT Study Version: 1
Created: Draft study version is not created until the form is saved

Enter descriptive information about your study on the Cataloging Information page. These fields comprise the metadata that describe this fields are required [*] or recommended [*].

Fields with a light blue background [] indicate that the field accepts HTML formatting. Fields with a light orange background [] indicate required (YYYY or YYYY-MM or YYYY-MM-DD). You also can add a new row [+] if needed, such as to include multiple authors, or remove

Click Save to upload files, set permissions, and more.

Select Study Template: Basic

Show Required and Recommended Fields Show All Fields

Title *

Data Citation Information

The Data Citation is generated automatically by the Dataverse based on the information entered below.

Study ID * hdl:10904/
10176

Deposit Date * 2012-10-11
(YYYY or YYYY-MM or YYYY-MM-DD; AD or BC optional)

Description and Scope





Description * Copying and pasting from a Word document can create errors when you save this page.

Description

Note: *Title* is the minimum requirement, but additional catalog information should be provided!

Example Dataset

- You can download an example dataset from
 - <http://bit.ly/astrodvnex01>
- It contains:
 - README.txt
 - spectra.fits
 - analysis.png
 - results.tbl

Name	Size
 README.txt	4 KB
 results.tbl	4 KB
 analysis.png	365 KB
 spectra.fits	168 KB

Add Data & Documentation Files (1)

1. View the study you will add data files to.
2. Click the “**Add File(s)**” link in the Action box on the right.
3. Select the “**Choose a Data Type**”:
 - Use “*Other*” for all Astronomy data.
4. Click “**Browse**” & upload a file from your local system.
5. Enter a file “*Category*” for grouping related files within a study:
 - e.g., Documentation, FITS, Image, Tables.
6. Enter a “*Description*” for each file (optional).
7. Click “**Save**” to retain uploaded file(s).

■ Edit Cataloging Information ■ Permissions
■ Add File(s) ■ Create Study Template
■ Edit Study Version Notes ■ Delete Draft Version
■ Release

UPLOAD FILES

i Select the Data Type from the drop-down list. Then click the...
SPSS (.sav or .por), STATA (.dta), CSV (character-separated value files, which can be analyzed online by using the Dataverse Net...
SPSS Control Card file is first required. When selecting a TAB (t...
You can use the file *Category* to define and group the types of f...
After you have selected the file(s) that you would like to add to t...

Other


Choose File No file chosen

Category	Documentation	File Name
<input type="checkbox"/>	Tables	results.tbl
<input type="checkbox"/>	Figures	analysis.png
<input type="checkbox"/>	FITS	spectra.fits
<input type="checkbox"/>	Documentation	README.txt

Add Data & Documentation Files (2)

Repeat for all files in dataset:

- Make sure to use the correct “*Data type*”.
- Click “**Save**” when finished.
- Categories, descriptions, and additional files can also be added later.

<input type="checkbox"/>	Documentation	
<input type="checkbox"/>	README.txt	 Download
	Plain Text - 227 bytes - 0 downloads	
<input type="checkbox"/>	FITS	
<input type="checkbox"/>	spectra.fits	 Download
	Plain Text - 163 KB - 0 downloads	
<input type="checkbox"/>	Image	
<input type="checkbox"/>	analysis.png	 Download
	application/octet-stream - 353 KB - 0 downloads	
<input type="checkbox"/>	Table	
<input type="checkbox"/>	results.tbl	 Download
	Plain Text - 140 bytes - 0 downloads	

Study Permissions

1. View the active study and click the “Permissions” Option in the Action box.
2. Two levels of permission are available:
 - *Entire Study*
 - *Individual File*
3. Allow users to request access to restricted files.

- Edit Cataloging Information
- Add File(s)
- Edit Study Version Notes
- Release
- Permissions
- Create Study Template
- Delete Draft Version

MANAGE STUDY PERMISSIONS

Restrict or permit access to this study, all files uploaded to the study, or selected files only. You can restrict all users, or permit selected users to access the study or files.

ENTIRE STUDY PERMISSION SETTINGS

Cataloging Information and File Settings: If this setting is public, files can still be restricted below.

User Restricted Study Settings: Username/Group:
Enter username/group to allow restricted study access.

FILE PERMISSION SETTINGS

Restricted File Settings: Allow users to request access to restricted files for this study (you will get an email notification for each request).

INDIVIDUAL FILE PERMISSION SETTINGS

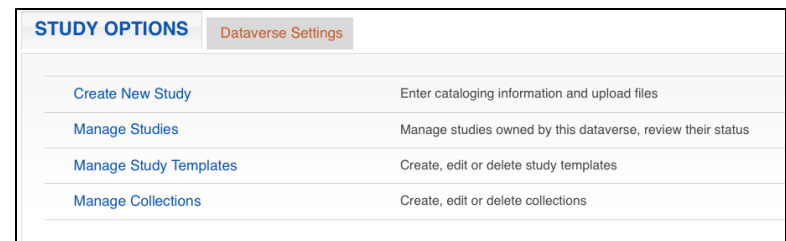
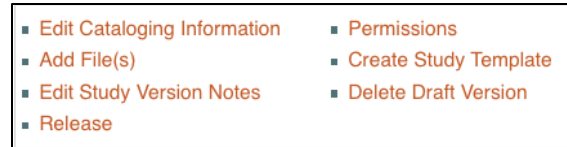
Restricted File User Access:
Select file and enter username/group to allow restricted file access, or set the file permission. (The single update button works for either field.) Select multiple users/groups by checking the boxes under User/Group Restricted File Access.

File Permission:

<input type="checkbox"/>	Category Name	File Name	Found in Version(s)	Permission	User/Group Restricted File Access
<input type="checkbox"/>	Documentation	README.txt	1	Public	
<input type="checkbox"/>	Figures	analysis.png	1	Public	
<input type="checkbox"/>	FITS	spectra.fits	1	Public	
<input type="checkbox"/>	Tables	results.tbl	1	Public	

Release The Study

- If viewing the study to be released, click the “**Release**” link in the Action box on the right side..
- Another way to release a study is from the “*Manage Study*” page:
 - Go to your Dataverse home page.
 - Click on the Dataverse **Options Icon**.
 - Click “**Manage Studies**”.
 - Click on the “**Release**” link on study’s row entry (the far right of the table).



A screenshot of the Manage Studies table, showing a list of study management options:

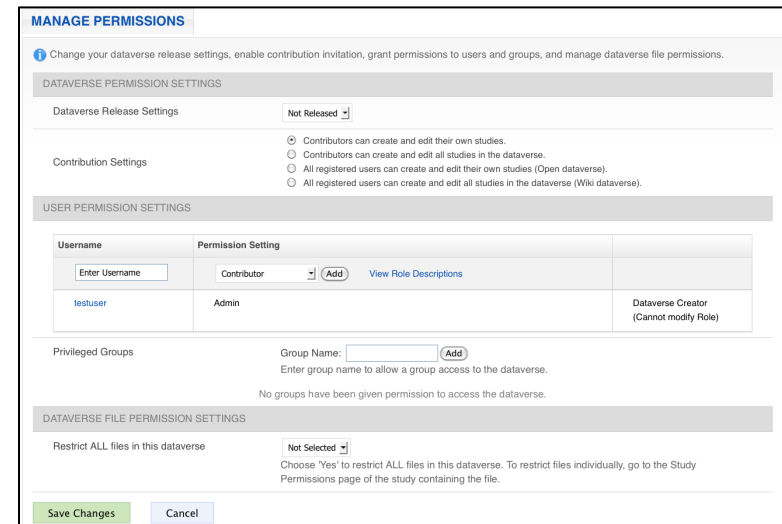
STUDY OPTIONS	
	Dataverse Settings
Create New Study	Enter cataloging information and upload files
Manage Studies	Manage studies owned by this dataverse, review their status
Manage Study Templates	Create, edit or delete study templates
Manage Collections	Create, edit or delete collections

Release the Dataverse

Releasing a Dataverse is as simple as changing the status to released:



1. Navigate to the Dataverse homepage.
2. Click on the “Dataverse options” gear **icon**.
3. Click on the “**Dataverse Settings**” tab.
4. Click on “**Manage Permissions**”.
5. At the top of the page, under “*Dataverse Permissions*”, change the status to “*Released*”.
6. Click “**Save**”.



MANAGE PERMISSIONS

Change your dataverse release settings, enable contribution invitation, grant permissions to users and groups, and manage dataverse file permissions.

DATaverse PERMISSION SETTINGS

Dataverse Release Settings: Not Released

Contribution Settings:

- Contributors can create and edit their own studies.
- Contributors can create and edit all studies in the dataverse.
- All registered users can create and edit their own studies (Open dataverse).
- All registered users can create and edit all studies in the dataverse (Wiki dataverse).

USER PERMISSION SETTINGS

Username	Permission Setting	
<input type="text" value="Enter Username"/>	Contributor <input type="button" value="Add"/> View Role Descriptions	
testuser	Admin	Dataverse Creator (Cannot modify Role)

Privileged Groups: Group Name:
Enter group name to allow a group access to the dataverse.
No groups have been given permission to access the dataverse.

DATaverse FILE PERMISSION SETTINGS

Restrict ALL files in this dataverse: Not Selected
Choose "Yes" to restrict ALL files in this dataverse. To restrict files individually, go to the Study Permissions page of the study containing the file.

Released, published, & searchable

- You Dataverse is now released and appears on the network homepage for browsing by others.
- Studies in the Dataverse are now searchable from the network homepage. By this definition the data is now “published.”
- Any subsequent editing, including adding files, will create a new draft “version” with those changes until that too is released.
- Updates increment the study version number.
- “Versioning” is an advanced topic to be discussed later.